



FULLCIRCLE
FINANCIAL

The great summer trade-offs

Hello Rebecca,

Summer is now in full swing, what are your plans? For many of us, we want to do it all; spend time at the cottage, the beach, and community events. Host cookouts for family and friends. Travel to new places, see all the blockbuster movies, the list goes on and on.

Realistically we know that we can't do it all. Even worse, if we think we can have it all, we may end up stressed and enjoying less.

It's the same with your financial strategy. It's full of trade-offs like risk vs. return, saving vs. paying off debt, retiring now or later, spending in retirement, or making bequests. As with your summer plans, the key here is to clarify your financial goals. Then you can prioritize and feel comfortable with the trade-offs.

This quote from financial author Nathan W. Morris sums it up: "It's not always that we need to do more but rather that we need to focus on less."

I can help you do this. Get in touch, and let's talk. In the meantime, enjoy the articles, hand-picked from the best economic and financial news of the last week. I look forward to hearing from you.



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Thoughtful Wealth Management Starts with a Conversation

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